

**1 Estate of Allen James Nichelini aka Allen J. Nichelini, Jr. Case No. 0485451**  
**Attorney Sahin, Peter A. (of Long Beach, CA, for Allen J. Nichelini, Jr. – Petitioner)**  
**Petition to Enforce Settlement Agreement**

<b>DOD: 1/3/92</b>		<p><b>ALLEN J. NICHELINI, JR.,</b> Son, is Petitioner.</p> <p><b>Petitioner states</b> he and Respondent Penny Raven entered into a written settlement agreement effective 11/15/94 to resolve litigation surrounding a will contest over the decedent's estate. Respondent has not performed the promises contained therein. The terms relating to the distribution of estate corporate shares in A. Nichelini Family, Inc., have not been carried out. The lack of performance has led to a material breach of the settlement agreement thus warranting court issuance of an order enforcing the settlement terms. Petitioner requests that this court issue an order distributing the subject corporate shares pursuant to the settlement terms.</p> <p>Petitioner provides background information as follows: On 2/24/93, a purported will was alleged to have been created. Decedent died 1/3/92, survived by his wife Patricia E. Nichelini and two issue, Petitioner and Respondent. The true names and capacities of Respondents DOES 1 through 10 whether individual, corporate, associate, or otherwise, are unknown to Petitioner at the time of filing this petition; therefore, Petitioner sues said Respondents by such fictitious names and will ask leave of court to amend this contest when ascertained.</p> <p>On or about 2/24/93, Respondent filed a Petition for Probate of Will and Letters Testamentary. On 6/21/93, Petitioner opposed and contested Respondent's petition and a will contest ensued. Respondent was appointed Special Administrator sometime between 6/21/93 and 6/16/95.</p> <p>On 6/16/95, the Probate Administration was terminated based on a petition by Respondent that the assets subject to administration were worth less than \$60,000.00.</p> <p style="text-align: center;"><b><u>SEE ADDITIONAL PAGES</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>SEE ADDITIONAL PAGES</u></b></p>
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b> x		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		

**Petitioner states** as confirmed in the Petition for Termination of Further Proceedings, the sole estate asset was 3,600 shares in A. Nichelini Family, Inc., a California Corporation. The parties entered into a written settlement agreement (attached) to resolve litigation surrounding a will contest. Respondent has not performed the promises contained therein. The agreement provides that Penny shall receive all shares as set forth in the will, but agrees to give 30% of said shares to Petitioner, provided that she retains all of the voting rights for those shares until her death, at which time the voting rights for those shares shall vest in Allen, his heirs, successors, or assigns. The settlement also provides for recovery of costs of suit and reasonable attorney fees by the prevailing party in any action brought to enforce or interpret the agreement. Petitioner alleges that Respondent has failed to transfer 30% of the subject shares, which instead have been retained exclusively by Respondent.

**Petitioner provides points and authorities citing CCP §664.6 and various case law and prays for an order as follows:**

1. Confirming Petitioner as the prevailing party in this action and awarding his costs and reasonable attorney fees payable by Respondent;
2. Entering judgment in favor of Petitioner transferring from Respondent the undistributed present day equivalent (incorporating any stock splits, buybacks, etc., since 6/16/95) of the 1,080 shares of A. Nichelini Family, Inc., and ordering that the acting Secretary of A. Nichelini Family, Inc., effectuate said transfer; and
3. For such other and further relief as the court deems just and proper.

**SEE ADDITIONAL PAGES**

**NEEDS/PROBLEMS/COMMENTS:**

1. This petition is not appropriately filed in this Probate Court. There is no open probate proceeding, and Petitioner has not cited Probate Code that allows the requested relief pursuant to Local Rule 7.1.1.C. Need authority for requesting relief in this closed estate case from this Probate Court in Fresno Superior Court. If Petitioner feels litigation within this estate case is appropriate, need authority for doing so without formally opening a probate estate.

Examiner notes case history as follows: On 4/27/93, Patricia Raven filed a Petition for Probate of Decedent's Will dated 4/15/87 which devises all business interests solely to Ms. Raven. Ms. Raven was appointed as Special Administrator without bond on 6/18/93 with only the power to vote the estates shares of stock in A. Nichelini Family, Inc.

Allen J. Nichelini, Jr., filed a will contest on 6/22/93. The Court's Minute Order of 4/11/94 states the matter was settled "as stated in record" and the trial was vacated. On 5/10/95, Patricia Raven filed a Petition for Termination of Further Proceedings stating that the property is not subject to administration due to the value of \$10,000.00 (less than \$60,000.00), and on 6/16/95, the Court entered its Order Terminating Proceedings.

Note that no personal representative was ever appointed, no will was ever admitted to probate, and this Court did not enter any judgment on the agreement.

Examiner notes that termination of administration based on the value of the estate implies that some other small estate procedure to pass the shares to the appropriate successor, such as a personal property collection affidavit, may have been intended. However, whether that occurred is unknown; however, any disputes thereafter would simply be civil litigation between the parties regarding their agreement unless an estate is opened on the shares are marshaled by a court appointed personal representative.

2. If this matter goes forward, need date of death of Patricia Nichelini pursuant to Local Rule 7.1.1.D.
3. Petitioner did not submit a proposed order pursuant to Local Rules 7.1.1.F, 7.6.1. If this matter goes forward, need proposed order.

**Second and Final Report of Administration of Estate by LaVerne T. Coelho as Executor, and Petition for Final Distribution on waiver of Account, and Waiver of Compensation of Personal Representative and Attorney**

<b>DOD: 4/7/96</b>		<b>LAVERNE T. COELHO</b> , Surviving Spouse and Executor with Full IAEA without bond, is Petitioner.  Accounting is waived.  I&A: \$329,250.00 (real property) POH: \$8,000.00 (fractional interests in certain real property)  Petitioner states the decedent's interest in the Kearney Vineyard was conveyed in settlement of litigation without monetary consideration.  Executor (Statutory): Waived Executor (Extraordinary): Waived  Attorney (Statutory): Waived Attorney (Extraordinary): Waived  <b>Distribution pursuant to decedent's will:</b> Laverne T. Coelho, Trustee of the Frank and Laverne Coelho Family Trust: Entire estate	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 7/14/15. The following issue remains:</b>  1. Written Acceptance of Trust filed 6/8/15 waives accounting, but does not contain all of the information required by Local Rule 7.12.5, including TIN and verification that the trust is in full force and effect and that the trustee has an executed copy of the trust in her possession.  Therefore, need Declaration pursuant to Local Rule 7.12.5.
<b>Cont. from 071415</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc <b>Reviewed on:</b> 8/11/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 2 - Coelho</b>	

## Waiver of Accounting and Petition for Final Distribution under Will and for Allowance of Statutory Fees and Commissions

<b>DOD: 3/7/06</b>		<b>HAL B. HAVLISCH</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting is waived by Bethesda Lutheran Communities, Inc., successor to Good Shepherd Lutheran Home of the West, sole distribute pursuant to the decedent's will.	<b><u>OFF CALENDAR</u></b> Amended petition filed 8/7/15 is set for hearing on 9/21/15.
<b>Cont. from 071415</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
✓	<b>Inventory</b>		
✓	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>	X	
	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
✓	<b>9202</b>		
	<b>Order</b>	X	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
0	<b>UCCJEA</b>		
	<b>Citation</b>		
N/A	<b>FTB Notice</b>		

## Probate Status Hearing

<b>DOD: 7/27/05</b>	<b>PUBLIC ADMINISTRATOR</b> was appointed Successor Administrator on 1/20/15. Letters issued 2/5/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont from 042115, 060915</b>	<b>History: JEFFREY MCCLAY</b> , Son, was appointed Administrator with Full IAEA with bond of \$252,000.00 on 5/23/06. Bond was filed and Letters issued 8/31/06. I&A filed 2/7/07 indicated residential real property valued at \$300,000.00.	<b>Minute Order 6/9/15: Ms. Kruthers has not yet seen the Declaration of Tracy Stevenson; she requests 60 days.</b>
<b>Aff.Sub.Wit.</b>	On 5/10/07, a Request for Special Notice was filed by Probate Referee Steven Diebert. On 10/12/07, a Creditor's Claim of \$1,105.65 was filed by Cancer Care Associates of Fresno. There was no further activity in the estate the Court set the matter for status hearing in 2013.	<b>Note: The above minute order appears to refer to the Declaration filed 6/5/15 by Tracy A. Stevenson, Attorney for Surety, American Contractors Indemnity Company. See Page 2.</b>
<b>Verified</b>	On 9/10/14, Attorney Alexander filed a petition for final distribution on behalf of his absconded client pursuant to Probate Code §10953(c). The petition indicated that the Administrator borrowed a sum of money to satisfy obligations and expenses of the estate, secured by the real property, and intended to make a distribution to his sister, make necessary repairs, and assume the loan after closing. The attorney was unaware whether any distribution of loan proceeds was made, whether any payment to the sister was made, or whether any repairs were made on the residence. The attorney requested surcharge of the Administrator to the extent of any breach of fiduciary duty, etc., and also requested statutory and extraordinary attorney's compensation.	<b>As of 8/11/15, nothing further has been filed.</b>
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>	<b>Minute Order 1/20/15 states:</b> The Court removes Jeffrey McClay and appoints the Public Administrator in order for them to pursue surcharging Mr. McClay on the bond. Tracy Stevenson requests time to have subpoenas issued and gather information. The Public Administrator is to submit a written status report for the 4/21/15 hearing.	<b>Reviewed by: skc</b>
<b>UCCJEA</b>	<b>Status Report Re Estate Assets filed 4/14/15 by Public Administrator states</b> Deputy PA Noe Jimenez spoke with Mr. Alexander, who believed that the only asset, the residence, was lost to foreclosure. He later found out that Mr. McClay may have benefitted from a loan he secured against the residence – a line of credit for \$120,000.00 on the house in 2007. It appears he pulled all the credit line money out, and the residence was sold at a trustee sale in 2010 for \$155,000.00. Mr. Jimenez believes he has found an accurate address for Mr. McClay in Sacramento, CA. The PA and counsel agree that Mr. McClay should be surcharged the full amount of the property listed on the I&A, \$252,100 of which should be paid by the bond company, less any amounts that the company can recover or show were paid to benefit the estate.	<b>Reviewed on: 8/11/15</b>
<b>Citation</b>		<b>Updates:</b>
<b>FTB Notice</b>		<b>Recommendation:</b>
		<b>File 4 - McClay</b>

## Page 2

**Declaration of Tracy A. Stevenson Regarding Discharge of Surety's Liability Upon Bankruptcy of Personal Representative filed 6/5/15 states:** Jeffrey M. McClay, the decedent's son, was appointed administrator of the decedent's estate on or about 5/23/06. ACIC filed its administrator's bond on behalf of Jeffrey M. McClay in the penal sum of \$252,100 on or about 8/31/06. In applying for that bond, McClay executed an indemnity agreement wherein he agreed to indemnify and reimburse the surety for all losses, attorney fee, and costs of any nature resulting from issuance of the bond.

On or about 7/8/08, while still acting as administrator of the estate, Jeffrey M. McClay filed a Voluntary Petition for Bankruptcy in the Eastern District of California, Case Number 2008-14472. That petition disclosed that he was administrator of the estate and as such held titled to the decedent's real property, subject to an encumbrance, and that he was an heir of the estate.

Because he was administrator at the time he filed for bankruptcy protection, the estate is charged with having knowledge of the bankruptcy filing and will failing to take action to seek relief from the bankruptcy court to protect its interests or pursue a claim. As such the estate's claim against McClay has been discharged by the bankruptcy court and the estate is barred from pursuing surcharge against him.

Because a claimant is required by law to obtain a surcharge judgment against a fiduciary before the surety's liability arises, the estate is legally precluded from proceeding against the surety in this matter.

Because McClay is bound by an indemnity agreement to indemnify the surety for all losses and fees and costs in connection with the bond, pursuing the surety would cause post-discharge economic loss to McClay and interfere with the fresh start granted by his bankruptcy discharge. (The surety did not receive notice of the bankruptcy action and the bankruptcy discharge does not preclude the surety from seeking indemnity from McClay, which it would do.)

See authority provided.

The declaration concludes that the estate's ability to pursue surcharge against Jeffrey McClay has been discharged by the bankruptcy court, and the estate's ability to pursue the surety on its bond is also discharged for two reasons: 1) a surcharge against McClay is a prerequisite to pursuing the surety, and a surcharge cannot be sought; and 2) pursuit of the surety would violate the fresh start objective of the Bankruptcy Code.

## Third Account Current and Report of Successor Conservator and Petition for Allowance of Compensation to Successor Conservator and Attorney

			<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			Account period: 3/23/13 – 4/30/15	
<b>Cont. from</b>				
	<b>Aff.Sub.Wit.</b>		Accounting - <b>\$98,524.86</b>	<b>Note:</b> If the petition is granted, a status hearing will be set as follows:
✓	<b>Verified</b>		Beginning POH - <b>\$32,948.63</b>	
	<b>Inventory</b>		Ending POH - <b>\$31,903.02</b>	
	<b>PTC</b>			
	<b>Not.Cred.</b>		Conservator - <b>\$904.02</b>	<b>Wednesday, June 21, 2017</b> at 9:00 a.m. in Department 303, for the filing of the fourth account.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
✓	<b>Notice of Hrg</b>		(4.67 Deputy hours @ \$96/hr and 6 Staff hours @ \$76/hr)	
✓	<b>Aff.Mail</b>	W/	Attorney - <b>\$1,250.00</b>	
	<b>Aff.Pub.</b>		(Less than allowed per Local Rule)	
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>		Bond fee - <b>\$316.80</b> (o.k.)	
	<b>Conf. Screen</b>		<b>Petitioner prays for an Order:</b>	
	<b>Letters</b>		1. Approving, allowing and settling the third account;	
	<b>Duties/Supp</b>		2. Authorizing the conservator and attorney fees and commissions;	
	<b>Objections</b>		3. Payment of the bond fee.	
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			<b>Reviewed by: KT</b>
	<b>Status Rpt</b>			<b>Reviewed on: 8/12/15</b>
	<b>UCCJEA</b>			<b>Updates:</b>
	<b>Citation</b>			<b>Recommendation:</b>
	<b>FTB Notice</b>			<b>File 5 – Frantz</b>



**Second and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and Attorney**

		<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 7/17/09 – 12/25/14	
<b>Cont. from</b>		Accounting - <b>\$97,443.07</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$ 2,210.51</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$ 1,184.07</b>	
<input type="checkbox"/>	<b>Inventory</b>	Subsequent Account period:	
<input type="checkbox"/>	<b>PTC</b>	7/17/09 – 12/25/14	
<input type="checkbox"/>	<b>Not.Cred.</b>	Accounting - <b>\$3,050.04</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Beginning POH - <b>\$1,184.07</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Ending POH - <b>\$ 594.37</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	Conservator - <b>\$4,629.68</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	(4.67 Deputy hours @ \$96/hr and 6 Staff hours @ \$76/hr)	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>	Attorney - <b>\$1,250.00</b> (Less than allowed per Local Rule)	
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>	Bond fee - <b>\$125.00</b> (o.k.)	
<input type="checkbox"/>	<b>Objections</b>	<b>Petitioner prays for an Order:</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	4. Approving, allowing and settling the third account;	
<input type="checkbox"/>	<b>CI Report</b>	5. Authorizing the conservator and attorney fees and commissions;	
<input type="checkbox"/>	<b>9202</b>	6. Payment of the bond fee.	
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 8/12/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 6 – Manning</b>

<b>DOD: 06/24/10</b>	<p><b>ROGER ROWELL</b> and <b>DAVID E. ROWELL</b>, were appointed as Co-Administrators with Full IAEA without bond on 02/17/11. Letters were issued on 02/17/11.</p> <p>On 10/21/11, <b>David E. Rowell</b> resigned as Co-Administrator. New Letters were issued to <b>Roger Rowell</b> as the sole Administrator on 11/01/11.</p> <p><b>Inventory &amp; Appraisal</b> filed 11/29/11 shows an estate value of \$289,000.00 (1/7<sup>th</sup> of a 40% interest in real property).</p> <p>On 02/08/13, the Court removed Roger Rowell and appointed the Public Administrator as Successor Administrator.</p> <p>Numerous Status Hearings have been heard since 2013. <b>Minute order from the last Status Hearing Re Filing of the First and Final Account on 06/09/15</b> set this matter for status and states: Counsel is to file a verified Status Report regarding the assets in the estate, the original Inventory &amp; Appraisal, what assets remain, and the efforts to contact the former Administrators; a petition to close the estate and request discharge may also be filed. The status hearing may come off calendar if the petition is filed at least two court days prior to 08/18/15.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Status Report and/or Petition to Close the Estate.</p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
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<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 08/12/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 – Rowell</b></p>		

**8 Cain Blanco, Trinity Blanco and Vanity Blanco (GUARD/P)****Case No. 11CEPR00659**

Petitioner: Oriana S. Blanco (pro per)

Guardian: Rosemary Blanco (pro per)

**Petition for Termination of Guardianship**

		<b>ORIANA S. BLANCO</b> , mother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of service of the Notice of Hearing on: a. Rosemary Blanco (guardian) b. Anthony Blanco (father) c. Cain Blanco (minor) d. Trinity Blanco (minor) e. Jesse Blanco (paternal grandfather) f. Joe Rodriguez (maternal grandfather) g. Grace Amerino (maternal grandmother)
		<b>ROSEMARY BLANCO</b> , paternal grandmother, was appointed guardian on 1/15/13.	
<b>Cont. from</b>		<b>Please see petition for details.</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	<b>Court Investigator filed 8/11/15</b>	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
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<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

<b>Reviewed by:</b> KT
<b>Reviewed on:</b> 8/12/15
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 8 – Blanco</b>

**9 Morgan Elizabeth Pasley (CONS/PE) Case No. 12CEPR00938**Attorney **Erlach, Mara M. (for Debra Pasley – Conservator – Petitioner)****Second Amended Account Current and Report of Conservator; Petition of Conservator  
Petition for its Settlement, for Allowance of Attorneys Compensation and for its Termination**

		<b>DEBRA PASLEY</b> , Mother and Conservator of the Person and Estate with bond of \$15,000.00, is Petitioner. (Not verified.)	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 6/2/15:</u> Counsel (John Hastrup) advises that previous counsel, Ms. Erlach, has resigned from their practice. Counsel is directed to obtain the signature of the Conservator for the account, with all additional documents being filed no later than 8/4/15.  As of 8/11/15, nothing further has been filed.  <u>Note:</u> A Substitution of Attorney has not been filed; therefore, Mara M. Erlach remains attorney of record.  <u>SEE ADDITIONAL PAGES</u>
		<b>Account period: 3/28/13 – 10/17/14</b> <b>Accounting:</b> <u>Not provided</u> Beginning POH: \$13,438.31 Ending POH: \$70,195.61 (\$1,715.61 plus a 1/5 interest in real property in Virginia valued at \$68,480.00)	
<b>Cont. from 042315, 060215</b>		<b>Petitioner states:</b> Inventory and Appraisal was filed 6/5/13 showing the value of the estate to be \$13,438.31. Summary of account and supporting schedules are provided at Exhibit B. (See #1.)	
	<b>Aff.Sub.Wit.</b>		
	<b>Verified</b>	x	
✓	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>	x	
	<b>Aff.Mail</b>	x	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>	3/28/13	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	x	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		As reflected in prior pleadings, the Conservator and Conservatee moved out of state. The Conservator was appointed Guardian of the Conservatee in Oklahoma by Court order and Letters issued on 8/13/14.  Petitioner does not request compensation for her services.  Petitioner requests attorney's compensation as set forth in Exhibit "C." (See #3.)  <b>Petitioner prays:</b> 1. That this account and report be approved and settled; 2. That the acts of the Conservator shown in the account and report be approved; 3. That, upon settlement of this account, the Conservator be directed to pay her attorneys, McCormick Barstow, LLP, compensation for services rendered and, as yet, unpaid; 4. That the Conservatorship in California be terminated; and 5. That the Court grant such other and further relief as it deems just and proper.	

**9 Morgan Elizabeth Pasley (CONS/PE) Case No. 12CEPR00938**

1. This petition does not provide any accounting in the form required by Probate Code §§ 2620, 1060, or any mandatory schedules on the required Judicial Council forms.

Need amended petition with accounting, schedules, including required mandatory form for summary. Although Petitioner has been appointed Guardian in Oklahoma, this Court retains jurisdiction for settling accounts pursuant to Probate Code §2630.

The only schedule provided at Exhibit B is a statement of property on hand, labeled as "receipts," but which does not show any account summary, receipts, disbursements, etc., and further indicates that the conservatorship estate cash has been reduced by \$11,722.70 without explanation.

Note: The Conservatee's interest in the Virginia real property is not an asset of this conservatorship estate, but should be referenced in its own schedule pursuant to §1063(h).

2. This petition is not verified by the Conservator as required by Probate Code §§ 1021, 1023.  
(Note: §1023 provides that an attorney may sign or verify on a client's behalf if he or she is absent from the county unless the person is a fiduciary appointing in the proceeding.)
3. Petitioner requests attorney's compensation pursuant to Exhibit C, but no Exhibit C is attached.
4. Need Notice of Hearing.
5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §1460(b)(6) on:
  - Morgan Elizabeth Pasley (Conservatee)
  - Debra Pasley (Conservator/Fiduciary, since the petition is not verified by her)
  - David Hal Jones (Father)
6. *The Court may also require notice to the surety of any continued or future hearings.*

<b>DOD: 3-29-13</b>		See petition, objections for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 7/14/15:</u> Parties are waiting for determination to be made by Justice Dibiaso regarding the disputed issues.  <u>Update:</u> Status reports were filed 8/12/15 and 8/13/15 by both attorneys. It is expected that a stipulation can be circulated so that the mediator can render his decision.  <u>Note:</u> The Order Settling Executor's First Account entered 12-8-14 authorized continuation of the administration for up to one year. A status hearing is set for 1-11-16 for the filing of the Second/Final Account.	
Cont from 020315, 031015, 051215, 061615, 071415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
✓	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc Reviewed on: 8/11/15 Updates: 8/13/15 Recommendation: File 10 - Carlson				

**11A AujaNeek Moore & Mary Jane Roberts (GUARD/P) Case No. 13CEPR01049**

Petitioner Debra D. Johnson (Pro Per – Maternal Grandmother – Petitioner)

Petitioner Sherrelle Moore (Pro Per – Maternal Aunt – Competing Petitioner)

Petition for Appointment of Guardian of the Person (AujaNeek)

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Maternal Grandmother Debra D. Johnson and Maternal Aunt Sherrelle Moore originally filed competing petitions for both minors.  On 1/20/15, Ms. Johnson was appointed Guardian of Mary Jane and Ms. Moore was appointed guardian of AujaNeek.  In this petition, Ms. Johnson seeks guardianship of AujaNeek in addition to Mary Jane.  Page B is the corresponding Petition for Termination of AujaNeek's Guardianship with Ms. Moore.  Ms. Moore's competing petition seeking guardianship of Mary Jane in addition to AujaNeek are Pages C and D of this calendar.  1. Need Notice of Hearing.  2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on: - Sherrelle Moore (Guardian) - Anthony Roberts (Father) - AujaNeek Moore (Minor)  3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: - Samuel Moore (Maternal Grandfather) - Donald "Ray" Roberts (Paternal Grandfather) - Mary Jane Roberts (Sibling)	
Cont. from 063015				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc Reviewed on: 8/12/15 Updates: Recommendation: File 11A – Moore & Roberts				

11A

**11B AujaNeek Moore & Mary Jane Roberts (GUARD/P) Case No. 13CEPR01049**

Petitioner Debra D. Johnson (Pro Per – Maternal Grandmother – Petitioner)

Petitioner Sherrelle Moore (Pro Per – Maternal Aunt – Competing Petitioner)

**Petition for Termination of Guardianship (AujaNeek)**

	See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  4. Need Notice of Hearing.  5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §1460(b)(5) on: - Sherrelle Moore (Guardian) - Anthony Roberts (Father) - AujaNeek Moore (Minor) - Mary Jane Roberts (Sibling) - Samuel Moore (Maternal Grandfather) - Donald "Ray" Roberts (Paternal Grandfather)	
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 8/12/15			
Updates:			
Recommendation:			
File 9B – Moore & Roberts			

**11B**



**11C AujaNeek Moore & Mary Jane Roberts (GUARD/P) Case No. 13CEPR01049**

Petitioner Debra D. Johnson (Pro Per – Maternal Grandmother – Petitioner)

Petitioner Sherrelle Moore (Pro Per – Maternal Aunt – Competing Petitioner)

**Petition for Appointment of Guardian of the Person (Mary Jane)**

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  6. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice on: - Mary Jane Roberts (Minor)  7. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice or declaration of due diligence on: - Donald "Ray" Roberts (Paternal Grandfather), if diligence not found.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 8/12/15				
Updates:				
Recommendation:				
File 11C – Moore/Roberts				

**11C**

**11D AujaNeek Moore & Mary Jane Roberts (GUARD/P) Case No. 13CEPR01049**

Petitioner Debra D. Johnson (Pro Per – Maternal Grandmother – Petitioner)

Petitioner Sherrelle Moore (Pro Per – Maternal Aunt – Competing Petitioner)

**Petition for Termination of Guardianship (Mary Jane)**

	See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  8. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice on:  9. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1460(b)(5) or consent and waiver of notice or declaration of due diligence on: - Mary Jane Roberts (Minor) - Donald "Ray" Roberts (Paternal Grandfather), if diligence not found.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/11/15
		Updates:
		Recommendation:
		File 11D – Moore/Roberts

**11D**

<b>DOD: 6/13/12</b>			<b>ELLEN ELLERBROCK</b> , Administrator, is petitioner.			<b>NEEDS/PROBLEMS/COMMENTS:</b>		
			Accounting is waived.					
<b>Cont. from</b>								
	<b>Aff.Sub.Wit.</b>		I & A	-	<b>\$213,513.05</b>			
✓	<b>Verified</b>		POH	-	<b>\$213,517.81</b>			
✓	<b>Inventory</b>		Administrator (statutory)	-	<b>\$7,270.27</b>			
✓	<b>PTC</b>							
✓	<b>Not.Cred.</b>		Attorney (statutory)	-	<b>\$7,270.27</b>			
✓	<b>Notice of Hrg</b>							
✓	<b>Aff.Mail</b>	W/	Costs (certified copies)	-	<b>\$50.00</b>			
	<b>Aff.Pub.</b>							
✓	<b>Sp.Ntc.</b>	W/	<b>Distribution, pursuant to intestate succession, is to:</b>					
	<b>Pers.Serv.</b>							
	<b>Conf. Screen</b>		Ellen Ellerbrock	-	<b>\$97,090.19</b>			
✓	<b>Letters</b>	5/28/14	Jerry Crippen	-	<b>\$97,090.19</b>			
	<b>Duties/Supp</b>							
	<b>Objections</b>							
	<b>Video Receipt</b>							
	<b>CI Report</b>							
✓	<b>9202</b>							
✓	<b>Order</b>							
	<b>Aff. Posting</b>							
	<b>Status Rpt</b>							
	<b>UCCJEA</b>							
	<b>Citation</b>							
✓	<b>FTB Notice</b>							
						<b>Reviewed by:</b> KT		
						<b>Reviewed on:</b> 8/12/15		
						<b>Updates:</b>		
						<b>Recommendation:</b> SUBMITTED		
						<b>File 12 – Abston</b>		

DOD: 03/06/14		<b>KAREN GREEN</b> , Executor, is Petitioner.  Accounting is waived.  I & A - \$211,977.42 POH - \$219,355.46 (\$8,355.46 is cash)  Executor - waived  Attorney - \$7,239.55 (statutory)  <b>Distribution, pursuant to decedent's will, is to:</b>  Karen Green - 100% interest in Union Bank Checking Account, 100% interest in 4 parcels of real property and 100% interest in household furniture and furnishings	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Neither the Petition nor the Order state the dollar amount to be distributed. Pursuant to Local Rule 7.6.1 A - All orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. <b>Monetary distributions must be stated in dollars, and not as a percentage of the estate.</b> Need revised Order.	
Cont. from				
✓	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			05/21/14
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
		Reviewed by: JF Reviewed on: 08/14/15 Updates: Recommendation: File 13 – Christian		

### **Probate Status Hearing Re: Filing of the First and/or Final Account**

[illegible]

**15 Josephine Hinckley Family Trust 10/6/92 - 4/4/14 Case No.14CEPR00920**

Attorney **Jaech, Jeffrey A. (for Gregory Hinckley – Trustee – Petitioner)**  
**First and Final Account and Report of Trustee and Petition for Its Approval**

<b>DOD: 4/26/14</b>		<b>GREGORY HINCKLEY</b> , Successor Trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Account period: 4/25/14 – 5/2/15</b>	
		Accounting: \$1,270,435.14	
		Beginning POH: \$1,215,537.10	
		Ending POH: \$ 962,457.45	
		<b>Petitioner states</b> about 10/14/14, Petitioner filed a petition to establish claim of ownership in favor of trust, etc., under Probate Code §850, seeking recovery of various personal items from Howard L. Hinckley (Chines snuff bottle collection, ivory figurines, silver). The parties reached settlement before hearing, attached as Exhibit 2.	
		<b>The beneficiaries entitled to notice are:</b>	
		<ul style="list-style-type: none"> <li>Howard Hinckley</li> <li>Claremont McKenna College</li> <li>UC Berkeley Foundation</li> </ul>	
		<b>Prior distributions:</b>	
		<ul style="list-style-type: none"> <li>Gloria Taylor: \$10,000.00 (Article Six, ¶ 6.0.1.D)</li> <li>Gregory Hinckley: Snuff Bottle Collection (Article Six, ¶6.01.C)</li> <li>Bruce Bickle, as Trustee of the Derek Hinckley Trust: \$200,000.00 (Article Six, ¶6.01.B)</li> </ul>	
		<b>Petitioner states</b> under Article Eleven, ¶11.03, Gregory Hinckley is authorized to purchase any tangible personal property for fair market value. He has purchased the trust estate's ivory and silver settings for \$7,700 and \$3,500 respectively, based on appraisal and/or comparable sale prices.	
		<b>Reserve: \$10,000.00</b> for closing expenses, final income tax returns, and attorneys' fees and costs.	
		<b>Proposed distribution is as follows:</b>	
		- Howard L. Hinckley: ½ of the trust estate (\$596,228.73)	
		- Claremont McKenna College: 2/3 of residue for the General Scholarship Fund Foundation (\$237,485.81)	
		- UC Berkeley: 1/3 of residue for scholarships for engineering students attending UC Berkeley. (\$118,742.91)	
		<b>Petitioner prays for an order that:</b>	
		1. The first and final account of Petitioner as Trustee be settled, allowed, and approved as filed;	
		2. All acts and proceedings of Petitioner as Trustee be confirmed and approved;	
		3. The proposed distribution of the remaining assets of the trust as set forth herein be approved; and	
		4. Such further order be made as the Court considers proper.	
<b>Aff.Sub.Wit.</b>			
✓ <b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
✓ <b>Notice of Hrg</b>			
✓ <b>Aff.Mail</b>	W		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
✓ <b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 8/13/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 15 – Hinckley</b>

**Second Amended Petition to Determine Succession to Real Property (Prob. Code §13150)**

<b>DOD: 11/28/14</b>	<b>MARY BROWN, WILLIAM DOYLE, and GLENDA THOMPSON,</b> adult children of the decedent, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD	
<input type="checkbox"/> Aff.Sub.Wit.	No other proceedings	
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	I&A: \$65,000.00 (real property located at 1237 Irwin Avenue in Fresno)	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Decedent died intestate	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioners request Court determination that the Decedent's 100% interest in the real property passes to them in undivided one-third interests each, as tenants in common.	
<input checked="" type="checkbox"/> Aff.Mail	W	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/13/15
		Updates:
		Recommendation: SUBMITTED
		File 16 – Doyle

**Petition for Probate of Will and Letters Testamentary; Authorization to Administer  
Under the Independent Administration of Estates Act (no orders or letters submitted)**

<b>DOD: 12/13/13</b>		<b>TOSHI SAKAI</b> , surviving spouse/named Executor without bond, is Petitioner.  Full IAEA – <b>NEED PUBLICATION</b>  Will dated 05/09/11  Residence: Fresno Publication: <b>NEED PUBLICATION</b>  <u><b>Estimated Value of the Estate:</b></u> Real Property - \$20,000.00  Probate Referee: <b>RICK SMITH</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>CONTINUED FROM 07/30/15</b></u> <b>As of 08/11/15, nothing further has been filed and the following notes remain:</b>  1. Need Notice of Petition to Administer Estate and proof of service by mail at least 15 days before the hearing of the Notice on all interested parties.  2. Need proof of publication.  3. Need Order and Letters.  <b>Note:</b> See page 17B for Report of Special Administrator; Waiver of Accounting; Request for Discharge of Special Administrator; and Request for Dismissal of Petition for Probate.	
<b>Cont. from 062515, 073015</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			s/p
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
	<b>Notice of Hrg</b>	x		
	<b>Aff.Mail</b>	x		
	<b>Aff.Pub.</b>	x		
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>	x		
✓	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b>	x		
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<b>Reviewed by:</b> JF <b>Reviewed on:</b> 08/11/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 17A - Sakai</b>	



**Report of Special Administrator; Waiver of Accounting; Request for Discharge of Special Administrator; and Request for Dismissal of Petition for Probate**

<b>DOD: 12/13/13</b>		<b>TOSHI SAKAI</b> , Special Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		Accounting is waived.		
<b>Cont. from 073015</b>		<b>Petitioner states:</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>	At the time of decedent's death, substantially all of his assets were held along with his surviving spouse (Petitioner, Toshi Sakai) as Co-Trustees of the Sakai Family Trust. Among the assets of the Trust were shares of stock of Calamerica Properties, a California Corporation. The remaining shares of the Corporation are owned by other relatives of the decedent.		
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w/o
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			Following decedent's death, it was determined that it was in the best interest of the Corporation to sell the real property owned by the Corporation. During the pendency of the sale it was discovered that a portion of the property was held in the individual names of decedent and his surviving spouse. Special Administration was needed so that Petitioner could execute two Quitclaim Deeds to the effected portions of the property from Mr. Sakai's name to the Corporation, thus enabling the sale to proceed.
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>	Petitioner states that she and the decedent never intended to hold the property in their individual names and always thought the entire property was owned by the Corporation. The fact that record title of a portion of the property stood in their individual names was a historical clerical error. No consideration was received by Petitioner or the estate in exchange for the Quitclaim deeds. All parties involved, including the holders of the other shares of the Corporation agreed that the property was always thought to be and treated as property of the Corporation.		
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
		Continued on Page 2		

Reviewed by: JF

Reviewed on: 08/12/15

Updates:

Recommendation:

File 17B – Sakai

When Petitioner was appointed as Special Administrator, the court required that Petitioner also file a Petition for Probate to administer the estate. A Petition for Probate was filed on 05/13/15, however, there are no assets of the decedent to be administered in a probate proceeding and there are no creditors of the estate. Therefore, there is no reason to administer the decedent's estate and the Petition for Probate should be dismissed.

All beneficiaries of the Trust (Petitioner and her daughters, Carrie Sakai and Leslie Nesley) have signed Waivers of Account and Request for Dismissal requesting that no accounting be required of Petitioner as Special Administrator and that she be discharged as Special Administrator and that the Petition for Probate be dismissed.

**Petitioner prays for an Order:**

1. Discharging Petitioner as Special Administrator of the Estate without the necessity of an accounting;
2. Dismissing the Petition for Probate filed on 05/13/15 and that this proceeding be brought to an end.

## Probate Status Hearing RE: Receipt for Blocked Account

Age:		NEEDS/PROBLEMS/COMMENTS:  <b><u>OFF CALENDAR</u></b>  Receipt filed 8/6/15
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 8/11/15
		Updates:
		Recommendation:
		File 18 – Cantu

Petitioner: Cheri Patterson (pro per)

**Petition for Appointment of Guardian of the Person**

		<b>TEMPORARY EXPIRES 8/18/15</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CHERI PATTERSON</b> , maternal grandmother, is petitioner.	<ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on:                         <ol style="list-style-type: none"> <li>a. Hannah-Mercedes Gail Clifford (mother)</li> <li>b. Ralph Davidson III (father) – unless court dispenses with notice.</li> </ol> </li> <li>3. Need proof of service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on:                         <ol style="list-style-type: none"> <li>a. Paternal grandparents</li> <li>b. Maternal grandfather</li> </ol> </li> <li>4. Petition does not include the names and current addresses of the paternal grandparents or the maternal grandfather.</li> <li>5. Petition does not indicate whether or not the minor has Native American Ancestry (Item 1c(2) and item # 8 of the child attachment).</li> </ol>
		<b>Please see petition for details.</b>	
<b>Cont. from</b>		<b>Court Investigator Report filed on 8/12/15</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 8/13/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 19 – Patterson</b>

DOD: 05/15/2015		NEEDS/PROBLEMS/COMMENTS:  <u>Continued to 09/29/2015 at the request of the Attorney.</u>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 08/14/2015
		Updates:
		Recommendation:
		File 20 – Markarian

Attorney Lopez, Amy L. (for Petitioner Arynn M. Smith, paternal aunt)

## Petition for Appointment of Temporary Guardian

		<p><b>TEMPORARY EXPIRES 8/18/2015</b></p> <p><b><u>General Hearing set for 9/15/2015</u></b></p> <p><b>ARYNN M. SMITH</b>, paternal aunt, is Petitioner.</p> <p><b>~Please see Petition for details~</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>Continued from 7/28/2015.</u></b> Minute order states continued for service as to the parents and minor, and filing of the Confidential Guardian Screening form. <i>[Note: All defects have been addressed; diligence as to the mother is in Court's discretion, thus the issue remains noted below.]</i></p> <p>1) Pursuant to Probate Code 2250(e), Need Notice of Hearing, and proof of five (5) court days' notice by personal service of the Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence for:</p> <ul style="list-style-type: none"> <li>Amy Ramage, mother, if Court does not filed diligence per Declaration filed 8/10/2015</li> </ul>																																																																			
<p><b>Cont. from 072815</b></p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td>✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td></td> <td>Notice of Hrg</td> <td>X</td> </tr> <tr> <td></td> <td>Aff.Mail</td> <td></td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td>X</td> </tr> <tr> <td>✓</td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td>✓</td> <td>Letters</td> <td></td> </tr> <tr> <td>✓</td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td>✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td>✓</td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>				<input type="checkbox"/>	Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.			Notice of Hrg	X		Aff.Mail			Aff.Pub.			Sp.Ntc.			Pers.Serv.	X	✓	Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt		✓	UCCJEA			Citation		
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	Citation																																																																					
	FTB Notice																																																																					
			<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 8/14/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 21 – Ramage</b></p>																																																																			

## Waiver Of Accounting and Petition for Final Distribution and Report and Statutory Attorney's Fees

<b>DOD: 5/30/14</b>		<b>CRAIG R. HANSEN</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting is waived	<b>Continued from 8/4/15. The following issues remain:</b>
<b>Cont. from 080415</b>		I&A: \$735,000.00	<ol style="list-style-type: none"> <li>The petition does not address whether notice was given to the CA Franchise Tax Board pursuant to Probate Code §9202(c). Declaration filed 8/5/15 states notice was given, but does not indicate when. The Court may require clarification and time for response, if notice was only recently given.</li> <li>Need consent to distribution of real property in undivided interests from Lena R. Hansen pursuant to Local Rule 7.12.4.</li> </ol>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH: \$735,000.00 (real property consisting of 26.04 acres in Fresno County)	
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>	Executor (Statutory): Waived	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Attorney (Statutory): \$17,700.00 (to be paid from Idaho probate)	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>	Costs: \$395.00 (publication, letters)	
	<b>Sp.Ntc.</b>	Distribution pursuant to Decedent's will:	
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>	Craig. R. Hansen: An undivided one-half interest in the real property	
<input checked="" type="checkbox"/>	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>	Lena R. Hansen: An undivided one-half interest in the real property	
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>	X	

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 8/11/15
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 22 – Hansen</b>

Age: 9		<b>KIMBERLY ANN BRYANT</b> , maternal grandmother, is Petitioner.  <b>KIMBERLY ANN BRYANT</b> and <b>W. KEVIN BRYANT</b> , maternal grandparents, were appointed Guardian of the Person in case no. 14CEPR00086 on 04/03/14. - <i>Consent &amp; Waiver of Notice of W. Kevin Bryant</i> filed 07/13/15  Father: <b>DEMONTE WILSON</b> – currently incarcerated; served by substituted service on 07/08/15  Mother: <b>SANDRA LITTLE</b> – deceased  Paternal grandparents: DECEASED  Maternal grandfather: W. KEVIN BRYANT - <i>Consent &amp; Waiver of Notice</i> filed 07/13/15  <b>Petitioner states</b> that guardianship of the estate is necessary because the minor will be receiving a settlement related to her mother's death.  <u><b>Estimated Value of the Estate:</b></u> Personal property - \$15,000.00	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>CONTINUED FROM 06/09/15</b></u>  1. Need <i>Notice of Hearing</i> (form GC-020).  2. Proof of Service filed 08/05/15 states that Demonte Wilson (father) was served on 07/08/15 by delivering the documents to Ada Miles a person authorized to accept service. Parents of a minor are to be personally served according to the Probate Code. The Court may require a proof of service reflecting personal service. <b>Note:</b> It is noted that the father is currently incarcerated.  <b>Note: Status hearings will be set as follows:</b> <ul style="list-style-type: none"> <li><b>Tuesday, September 22, 2015 at 9:00am in Dept. 303</b> for filing of the Receipt for Blocked Account;</li> <li><b>Tuesday, January 19, 2016 at 9:00am in Dept. 303</b> for filing of the Inventory &amp; Appraisal; and</li> <li><b>Tuesday, October 18, 2016 at 9:00am in Dept. 303</b> for filing of the First Account.</li> </ul>
Cont. from 060915, 080415			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail	n/a		
Aff.Pub.			
Sp.Ntc.		<b>Reviewed by:</b> JF <b>Reviewed on:</b> 08/12/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 23 – Wilson</b>	
Pers.Serv.	x		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report	n/a		
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA	n/a		
Citation			
FTB Notice			



**24 Nicholas Alvarez, Rebecca Alvarez, & (GUARD/P) Case No. 15CEPR00718****Samuel Alvarez**

Petitioner Espinoza, Sonia (Pro Per – Non-Relative)

**Petition for Appointment of Temporary Guardian**

<u>GENERAL HEARING 9/23/15</u>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>SONIA ESPINOZA</b> , Non-Relative, is Petitioner.		<ol style="list-style-type: none"><li>1. Need Notice of Hearing.</li><li>2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for:<ul style="list-style-type: none"><li>• Ernesto Alvarez, Sr. (Father)</li><li>• Rebecca Bills (Mother)</li></ul></li><li>3. Need UCCJEA.</li></ol>
<u>Please see petition for details</u>		
Rebecca, age 15		
Nicholas, age 13		
Samuel, age 13		
Cont. from		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	X	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	X	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA	X	
Citation		
FTB Notice		
Reviewed by: LV		
Reviewed on: 08/14/2015		
Updates:		
Recommendation:		
File 24 – Alvarez		

**25 Crystal K. Burleson (GUARD/P) Case No. 07CEPR00110**

Petitioner Perry, Brenda Kay (Pro Per – Non-Relative)

**Petition for Appointment of Temporary Guardian of the Person**

<b>Age: 10</b>	<b><u>GENERAL HEARING 10/05/2015</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>BRENDA KAY PERRY</b> , non-relative, is petitioner.	1. Need Notice of Hearing.
	<b><u>Please see petition for details</u></b>	2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"><li>• Bruce Burleson (Father)</li></ul>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	X	
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	X	
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 08/14/2015
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 25 – Burleson</b>

**25**